



This RFP is for educational purposes and was based on several institutions and even non-banking organizations. Any resemblance to an actual banking organization is purely coincidental

Request for Proposal for:

Development of Blended Leadership Program

Submitted to Vendors on:

February 1, 2003

Proposals Due to MegaBank on:

March 17, 2003

Contact Information:

Karl M. Kapp

Address

Phone Number

Email Address



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MegaBank RFP Request for Proposal

I. Overview of the Project

MegaBank is one of the largest regional banks in the Mid-Atlantic States with branch offices in several states along the East Coast from Maine to Florida. MegaBank is the result of mergers of several banks over the past five years. MegaBank is the combination of three well known banks; BankCo, SuperBank, and RegionalOne. The results of the mergers have been a focused, lean bank which is able to meet the needs of both corporations and individuals. MegaBank is currently the third largest financial institution on the East Coast. It is headquartered in Albany, New York, with over 740 community banking offices, over 1,500 ATMs, and about 9,500 employees. MegaBank also has a full service banking web site providing extensive customer service to our clients.

We are a progressive institution and have been named to *InformationWeek's* **'Leading IT Innovators'** list for being an innovative user of technology. We were ranked first among the Banking Industry and 30th overall, up from 89th in 2001. This is due primarily to our web site which allows customers to access accounts, make transactions, and interact with our financial experts.

As we continue to solidify our position within the banking industry, we have realized the need to put into position, a highly qualified, highly trained work force. We believe that our key strength and competitive edge in the future will be our organization's ability to outmaneuver and out lead our competitors.

We are seeking bids from qualified vendors for assistance in creating a training curriculum that will prepare key personnel in high ranking positions for advancement. Our desire is to create a Leadership Curriculum that will prepare our branch managers, regional managers, corporate account managers and our junior executive staff to become well-trained corporate leaders. We envision a curriculum that includes a wide variety of materials and educational information to provide over 40 hours of instruction on key leadership areas. We desire the vendor to help us identify our core competencies and to incorporate those competencies into our newly established leadership program. The remainder of this Request for Proposal details our requirements.

II. Submission Process and Timeline

Written proposals must be submitted to MegaBank no later than 9:00 am on March 17, 2003 in 2221 McCormick Center. No late proposals will be accepted. Three hard copy documents are expected as well as one file in the Adobe Acrobat



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format on a CD-ROM or Zip Drive. Proposals can be no longer than 40 pages, must be single spaced and use 12 point font.

Prior to the due date, you may contact our Chief Learning Officer (CLO) Dr. Karl Kapp (contact information below) to ask questions clarifying our needs and expectations. Karl or someone he designates will respond promptly. To the extent possible, please try to “batch” your questions and schedule calls in advance. A bidders conference is scheduled for February 17, 2003. Questions should be submitted in writing no later than February 16, 2003 to Dr. Karl Kapp

Dr. Karl Kapp
2221 McCormick Center
Institute for Interactive Technologies, MegaBank Division
kkapp@bloomu.edu or via phone at 570-389-4849.

MegaBank will evaluate all proposals in the weeks following submission. During this period, we may contact you for clarifications or to request revisions. Vendors who make the final cut will be requested to provide an “in-person” 30 minute presentation of their recommended solution as well as show prototypes of the materials they are planning on developing. The presentation will also include a 60 minute question and answer period. We expect to award the project on April 10, 2003.

III. Project Description

We view this RFP as having four separate deliverables.

- Competency Map
- Leadership Curriculum
- Knowledge Transfer
- Administrative Maintenance

Each are explained in more detail below:

Competency Map. A detailed competency map of our core competencies and how they translate into positive business outcomes. In the proposal, we request a detailed plan of how the vendor will perform a competency mapping of our organization. We desire to know the necessary resources that are required of MegaBank as well as any needed materials or documentation we must provide to assist with the mapping process.

Leadership Curriculum. We require a full description of the Leadership Curriculum you plan to propose to our key leaders. We are open to any type of delivery method and prefer a mixed approach. Educational materials can include,



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but are not limited to, video tapes, instructor-led facilitator guides, participant guides, on-line learning, audio tapes, simulations, scenarios and job aids. We also expect a complete description of the instructional strategies you will use for each delivery or media method and a rationale for those strategies.

Knowledge Transfer. You must develop a plan for how you are going to work with MegaBank personnel to transfer the knowledge from your developers to our 20 person, decentralized training team. This team will ultimately be responsible for the Leadership Curriculum once the vendor engagement is terminated.

Administrative Maintenance. We require a suggested process for maintaining the administrative end of the completed Leadership Curriculum which includes tracking students scores, time to completion, number of attempts at learning information, and other important data for assessing the leadership potential of these key employees.

Note: We require an original curriculum based on our core competencies and are not willing to purchase an “off-the-shelf” solution or a solution that is slightly modified from another leadership curriculum. If leadership is to be a strategic advantage for MegaBank, we must have a customized leadership solution.

IV. Selection Criteria

Vendor selection will be based on MegaBank’s assessment of five aspects of your submission:

Innovative Approach. We do not want the typical, standard leadership training. We want interactive training involving situations that actually impact performance. We want leaders to begin to emerge from this instruction. We don’t believe one delivery method alone is enough to adequately prepare our leaders for the future.

Instructional Strategies. We want to know that the right instructional strategies are being applied to the right types of learning. We do not want a “one-size-fits-all” approach to our leadership training.

Deliverables. We are looking for a reasonable description of how the deliverables will be developed and when we can anticipate the deliverables.

Project. We examine the following elements of your project; quality of the people you would assign (as judged by resumes and face-to-face); your experience with similar projects as judged by observation of demonstrations and



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conversation with references; how you propose to handle shifts in project scope or timelines; integrity; availability of resources needed to complete project in a timely manner and your quality assurance process.

Proposal. We will be looking at your organization, clarity, and brevity. Be brief and to the point. Do not include “boiler plate” materials except as appendices (e.g., company background).

V. Vendor Response

Your proposal must be organized into the following sections:

1. Letter of Transmittal
2. Executive Summary: Include an outline of your design solution, and time and cost to complete the work. Maximum of two pages.
3. Understanding of the Need: Briefly state the need as your organization sees it based on the RFP and the responses from the bidder’s conference. This section should be broken down by deliverable.
 - i. Competency Map
 - ii. Leadership Curriculum
 - iii. Knowledge Transfer
 - iv. Administrative Maintenance
4. Overview of the Solution: Provide an overview of the process you will undertake to develop and prepare each deliverable Please include design strategies, analysis processes, and any other applicable elements of your proposed solution. This section should also be broken down by deliverable.
 - i. Competency Map
 - ii. Leadership Curriculum
 - iii. Knowledge Transfer
 - iv. Administrative Maintenance
5. Proposed Solution. This section must include instructional strategies, delivery methods and development methodology. Explain how each portion of the curriculum will be delivered to our key personnel. We anticipate different media being needed for different types of leadership skills.
6. Project Management and Schedule: Describe your approach. Include a work plan outlining resources (yours and ours), phases, timelines, and deliverables as described above. You should include a graphical - e.g. work plan as an appendix.
7. Working Relationship. We desire a brief description of the working relationship the vendor intends on having with MegaBank.
8. Budget: We desire a comprehensive budget outlining initial cost for the project and any potential on-going costs. We also would like an estimation of the value of our investment over the next two years in terms of anticipated performance improvements (not cost savings or cost avoidance.)



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9. Corporate Capabilities: We are looking for experts on leadership and designing instruction, please list all appropriate credentials and background of your company in this area. List similar projects you have completed in the past and the specific clients for whom you have completed the projects. We want to know about both instructor-led and on-line instruction you have developed.
10. Appendices: In addition to any other appendices you choose to add, include client references and resumes of the core team members. In this section, you may want to include prototype screens.

VI. Audience Description

We have over 1000 bank managers, regional managers and other leadership candidates with the following characteristics:

- 90% have a four year college degree
- 25% have some sort of graduate degree
- 40% are female and 60% are male
- Ages range from 33 to 56
- Average proficiency with computer applications
- 75% have been in the position less than 5 years
- Longest time in position is 15 years, shortest is 6 months

VII. Technology Infrastructure

While we do not anticipate the entire curriculum being on-line, we do expect some of the materials to be available over our corporate intranet. Therefore, the following is a description of our corporate intranet on which the training can be housed.

Server Configuration

Windows 2000
512 RAM
Dual Pentium II Processor at 500 Mhz
36 Gigabyte harddrive
24 x 24 CD-ROM
1 Gigabyte Ethernet connection

Typical Workstation

600 Mhz
CD-ROM 24 x 24
128 RAM



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Monitor Resolution: 800 x 600
Sound Card: 16 bit
Ethernet connection (10 Mbps)

The vendor is to design any training software to run on Internet Explorer 5.0. The access to the instruction will be through a T1 while at work. The vendor needs to incorporate into the time line the fact that we have a staging server where all software used within the organization is tested prior to being released. It takes approximately two months for testing to pass through this process. These two months must be reflected in your presentation of the timeline.

VIII. Working Relationship

The work described here will be accomplished by working with teams throughout MegaBank to determine our core leadership competencies and skill gap that need to be trained. The general working relationship is described here. Any additional responsibilities will be detailed in the contract.

- Project managers will be assigned by both MegaBank and the vendor and will act as a single point of contact.
- It is understood that the selected vendor will need to interface with MegaBank's project team. Vendors may need to travel to MegaBank's site for review or meetings.
- Vendors will submit weekly status reports and participate in weekly status meetings.
- We expect the vendor to provide quality training materials both from a functionality stand point as well as an instructional stand point.

Confidentiality

Contractors of MegaBank work with highly confidential information. The contractor, its officers, agents, employees and subcontractors (if applicable) shall treat all information obtained by it through its performance under the contract, as confidential information to the extent required by the laws of the State of New York and the United States. Individually identifiable information shall not be disclosed without prior written approval of the Project Manager. Use of information obtained by the contractor in the performance of its duties under this agreement shall be limited to purposes directly related to contract requirements.



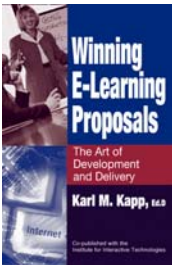
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The contractor, its officers, agents, employees, and sub-contractors (if applicable) associated with this project must abide by the current State, agency, and departmental confidentiality and privacy provisions and must sign a statement agreeing to these provisions.

IX. Conclusion

We are seeking a high quality vendor who can prepare an innovative, exciting Leadership Curriculum for MegaBank. We view our personnel as a strategic advantage and want to be poised for the future through highly trained, highly skilled leaders. The vendor that completes the project on-time and within budget would be well positioned for future training opportunities with MegaBank.

This RFP Example is courtesy of:



Karl M. Kapp, Ed.D. Karl is the author of the book “Winning E-Learning Proposals: The Art of Development and Delivery” which describes the entire e-learning business acquisition process from finding an RFP to creating a winning proposal, to presenting the winning idea in a sales meeting. The book is ideal for both e-learning RFP developers as well as those responding to RFPs.

It is available at www.jrosspub.com. Karl is the Assistant Director of the Institute for Interactive Technologies and an Associate Professor of Instructional Technology at Bloomsburg University in Bloomsburg, PA and can be visited at www.karlkapp.com